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Leadership for Today Manageable Meetings

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Leadership for Today
Manageable Meetings

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At one time or another, we have all answered the call to civic duty by serving on a committee or advisory board. For some, the experience has been productive and energizing. For others, the experience has been painful, marked by long meetings that are unorganized and frustrating.

Good meetings don't just happen; they require thoughtful planning and implementation. In fact, meeting quality is often a critical component used in measuring the effectiveness of a particular group. Potential members are often aware of the "meeting history" that a particular group has — thus influencing their willingness to become members.

The ability to organize and lead productive meetings can increase the amount of business completed by a group. This skill set will save the group time and improve the participation level of group members. Successfully implementing a meeting agenda and managing group discussion are skills that group leaders must demonstrate in order to successfully conduct effective and manageable meetings.

Meetings are not difficult to plan. The following steps will insure a successful meeting format.

Step 1: Determine the purpose of the meeting

Ask the question: "Why is this meeting being scheduled?" Determine whether you are planning the meeting out of habit or necessity. Identify what needs to be accomplished and who needs to be involved to accomplish the task. If individual conversations, emails, or phone calls could accomplish the task, a meeting is not necessary (and, thus, the value of future meetings is retained). Ensure that meetings have useful content on the agenda before calling them.

Step 2: Be sure to follow the *Golden Meeting Guidelines*

Once you have determined that a meeting should be held, begin to plan your meeting using the *Golden Meeting Guidelines* (Pitrak and Hoopfer 1979). They are simple and can be used for formal and informal gatherings.

1. All meetings must have clear objectives or outcomes.
2. Invite a neutral person to facilitate sensitive meetings.
3. All meetings should have an agenda that includes
   - topics for discussion,
   - a presenter or discussion leader for each topic,
   - time allotment for each topic.
4. Meeting information should be circulated to everyone prior to the meeting taking place. This should include
   - meeting agenda,
   - location/date/time,
   - any background information on specific topics of discussion,
   - assigned items that group members are responsible for (i.e., reports).
5. Meetings should start and end on time. This becomes a defining mark for the importance the group places on the quality and effectiveness of the meeting. As a general rule, meetings should never exceed two (2) hours — after that, fatigue sets in.

6. Meeting participants/group members should
   - arrive on time,
   - be well prepared,
   - be concise and to the point,
   - participate in a constructive manner.
7. Meeting notes (minutes) must be recorded and made part of your group's organizational archives/history.
8. The decisions made by the group during the meeting must be documented.
9. Assigned action items should be documented in the notes (minutes), and the action committee chair/facilitator or another designated individual should follow up on the completion of the action item and give a report to the larger group at a later point in time.

Step 3: Set the outcomes for the meeting

Before planning the meeting agenda, be sure to identify the basic objectives you hope to accomplish by the end of the meeting. This will result in a focused agenda that will allow group members to feel productive and positive about the experience. For example, ask yourself: "By the end of this meeting, I want the group to…."

Your answers to the preceding question will be the foundation for the meeting objectives and, thus, the focus of the meeting agenda. Your answers should be concrete phrases like "...agree upon the annual budget," "...leave with a timeline for implementing the fundraising campaign," or "…generate three ideas for the community clean-up campaign."

Step 4: Create the agenda

While setting meeting objectives helps to build the meeting agenda, taking the time to gain member input on the agenda's contents is time well spent. The meeting agenda will be your road map for the course of the meeting — outlining what will happen, when it will happen, and by whom. Be sure to detail your agenda in the following way:

- Identify the purpose of each agenda item. Label the items as *information* (an update), *discussion* (members will explore an issue as a group), or *decision* (requires group action).
- Identify the person that will be responsible for each item on the agenda. Ensure that they are aware of their meeting responsibility and will be prepared with an oral or written response.
- Identify the amount of time that will be allotted for each item on the agenda.
- Arrange the agenda items in order of priority. The early moments of the meeting are the most energetic and, thus, should consist of those agenda items that are of greatest importance or will require the greatest amount of group dialogue and deliberation — including those *decision* items identified on the agenda.

Figure 1. Sample agenda

Agenda:
Name of Group
Date
Time
Location

7:00 p.m.	Welcome, overview of agenda (Alice)
7:15 p.m.	Review & approve minutes of last meeting (Bill)
7:20 p.m.	Information update on fundraising campaign (Julie)
7:25 p.m.	Discussion on resource brochure (Doug)
7:45 p.m.	Decision on resource brochure: content & layout for printing (Alice)
8:00 p.m.	Stretch/snack
8:15 p.m.	Discussion on youth technology camp (Chris)
8:35 p.m.	Decision on youth technology camp: dates, teachers, subjects, audience (Alice)
8:40 p.m.	Discussion on group Web site (Mike)
8:50 p.m.	Summary comments and review of meeting (Alice)
9:00 p.m.	Adjourn

Date, time & location of next meeting.

Step 5: Prepare for the meeting

The physical and social environment of a meeting will often influence the outcomes experienced by those in attendance. Comfort and effectiveness is paramount and should be accounted for by the person organizing the meeting. The following are items that should be accounted for in preparation for the meeting:

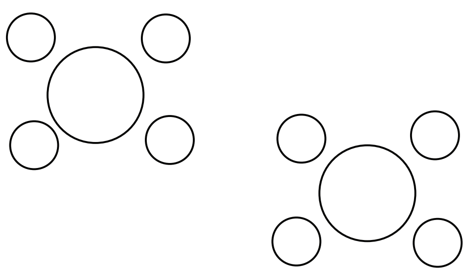
- Be sure to use name tags or table tents if participants do not know each other. Print should be large enough to read across the table/room.
- Visual aids should be set up and accessible for speakers or group participants to use if needed. This includes a laptop, LCD, tape recorder, newsprint, easel, etc.
- Participants will often contribute more to a meeting if they are comfortable and the atmosphere is supportive. If possible, select a room with movable accommodations that can be re-arranged to fit the type/goals of the meeting that will occur.
- For small groups (20 people or less), it is often advisable to have the participants face each other. Allow adequate space for working and writing. Having tables available for a meeting of this size is advisable.
- For larger groups, having rows of chairs available is

often more accommodating than seating at tables. Curving the rows into a half-moon shape with the ends of the rows closer to the front of the room will improve visibility and group cohesion.

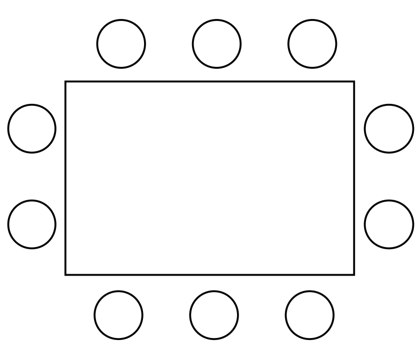
- In small groups, avoid the use of a podium or "head table." Instead, have the facilitator or chairperson sit amongst the meeting participants. In most instances, the use of a podium or head table dictates a "power role" that could be distracting for the work of the group. For large groups, the facilitator or chairperson should stand so that they can be seen by the meeting participants. Again, keep in mind that a podium will often subtly indicate a "status" difference or be seen as a "barrier" should the facilitator use it (versus standing in front of the group without the podium or table).

Figure 2. Various room arrangements that can facilitate various meeting types and functions (Learning Today, Leading Tomorrow, Penn State Extension, 2005)

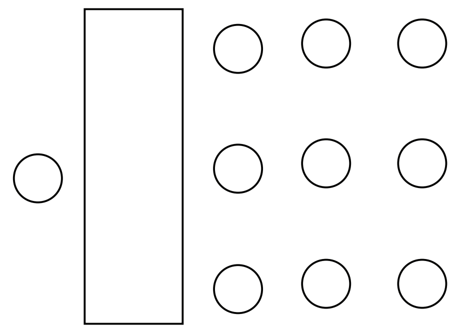
Individual Tables:
Advantages: *Builds teams; easy for chairperson to move around group*
Disadvantage: *Increases sidebar conversations*



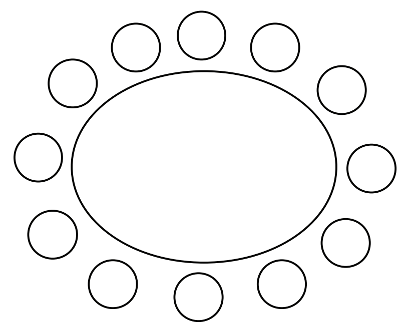
Rectangle:
Advantages: *Good for small meetings; encourages discussion*
Disadvantage: *limits number of participants to table size*



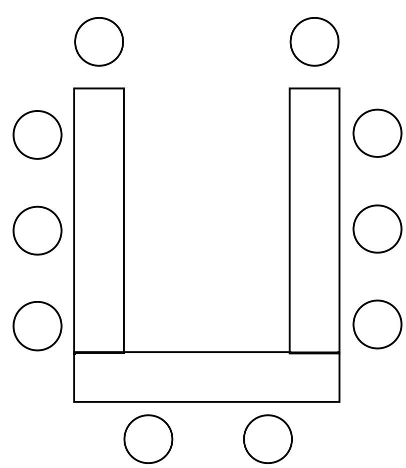
Classroom Style:
Advantages: *Allows for many participants; leader clearly is in charge*
Disadvantages: *Encourages one-way communication; hard to hear in back of room*



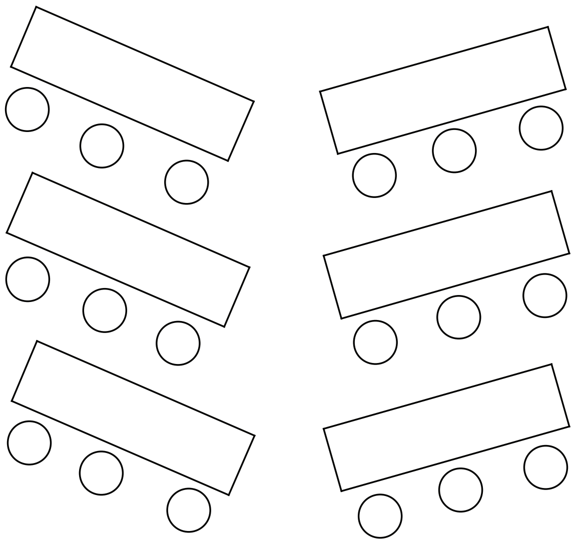
Circle:
Advantage: *Good for unifying or group cohesion*
Disadvantages: *It is hard to know who the leader is; limits the number of participants to size of table*



U-Shaped:
Advantage: *Easy for group eye contact*
Disadvantages: *Reduces people getting to know each other; discourages small group team building*



Herringbone:
Advantages: *Creates center aisle; equalizes status of group members; it is easier to see everyone*
Disadvantages: *Hard to hear in back of room; creates impersonal atmosphere*



Regardless of the room arrangement selected, the setting should be conducive to inclusion, participation, information sharing, efficiency, and group cohesion.

Step 6: Facilitate a successful meeting

A meeting will often be organized and carried out by a team of individuals who hold various responsibilities. It is crucial that all meeting participants come to the meeting prepared to carry out their various roles and responsibilities. It is critical to remember that all individuals that attend a meeting carry a role in conducting the meeting — regardless of whether they hold an elected position or not. These roles and responsibilities are as follows:

- **The chairperson:** Responsible for preparing the agenda, guiding meeting discussion, delegating work, ensuring effective group process and communication, and meeting follow-up. This is usually a more formal role, and the chairperson has the ability to make rulings, determine procedure, or delegate authority.
- **A group facilitator:** A facilitator will propose, suggest, invite, or guide a group toward consensus and decision making toward a proposed action. In this case, a facilitator's "power" does not come from the elected position, as in the case of a chairperson, but rather from the group's empowerment and recommendation.
- **Secretary or Recorder:** Responsible for keeping group meeting notes (historical record of activity), while also serving as a group member.
- Other established titles as deemed appropriate can include **treasurer** (responsible for fiscal accountability of the group), **timekeeper** (assists chairperson with enforcement of time frames established on the meeting agenda), and **monitor** (assists chairperson with group processing and monitoring conversation and feedback).
- **Group members:** Responsible for preparing for and participating in in the following ways:
  a) reviewing the agenda and reading the required materials prior to the start of the meeting,
  b) arriving to the meeting on time,
  c) participating in the meeting discussion(s),
  d) taking notes for assigned duties or actions — not waiting for the meeting minutes to serve as a personal reminder of assigned tasks,
  e) not monopolizing discussion or engaging in side conversations during the course of the meeting,
  f) asking appropriate questions,
  g) looking for common ground when making decisions,
  h) staying focused on the meeting outcomes.

Step 7: Meeting follow-up

When the meeting is close to ending, be sure to conduct a quick summary of the highlights. This ensures one last opportunity for group members to understand the discussion, decisions and delegation of the group's tasks that have been identified for action.

Also take advantage of the opportunity to evaluate the meeting as a whole — including asking the key questions:

- Did we accomplish our goals for the meeting?
- What can we do to improve how we work together?
- What remains to be done?

Following the assessment of the meeting, the chairperson should

- thank the group for their work;
- summarize the decisions and points of action from this meeting;
- identify carry over items for the next agenda;
- finalize the date, time, and place for the next meeting.

Following the conclusion of the meeting, the chairperson should work with the secretary to clarify the meeting minutes or complete the meeting summary sheet. The chairperson should insure that the meeting summary sheet or meeting minutes are distributed promptly following the conclusion of the meeting. Thank you notes or other correspondence should be sent to guests and speakers in a timely fashion.

Figure 3. Example meeting summary sheet

Meeting Summary Sheet

I. Basic Information

Meeting of: (Name of your group)

Date & Time:

Place:

Person Presiding:

Persons present: (first and last names)

II. Decisions Made:

a)

b.)

c.)

d.)

III. Follow-up Responsibilities (who will do what by when)

Task	Point Person	Due
Focus on action verbs: arrange, call, send out, etc.	**Could be an individual or sub-committee**	**Specific date**

IV. Incomplete Items (for next meeting)

Task	Point Person	Due

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